Message
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From: Android Leadership@google.com Android Leadership@google.com]
on behalf of   Ryan PC Gibson ████████@google.com]
Sent: 4/17/2013 12:06:32 AM
To: android-leadership ████████████@google.com]
Subject: Re: Android Leadership 2013-04-16

Notes:

Apr 16, 2013

Sundar: Looking at statistics for Google services on Android. On phones, usage (e.g. search) stats naturally trails device activations, but better than iOS. On tablets, the usage is much lower. The picture appears that while more and more Android tablets are being purchased, the only ones that see real (Google, search) usage is iPads. Gone from 21-35% tablet shipments in last six months (excluding Kindles). Anecdotally, not seeing tablets used outside Google. Evidence from search is that people are using tablets … using iPads, that is.

Android did great thing from an open source origin, getting 70% phone share. Discusses partner-competitor (Samsung, Amazon, Facebook) positioning with the Android ecosystem. Looks at Android laptop project, and understands where that came from what the vision is. What really stressed out is where we are with tablets though. Bottom line, thinking about KLP and consolidating our position towards a competitive user experience we want. Fundamentally, cloud services matter a lot, e.g. Maps, Now. Things that Apple, or Samsung really struggle with. Only companies that do this well are Amazon, Facebook and Google. Maps, YouTube, Babel, Now, Voice all are key cloud services. Gmail isn't yet since it allows IMAP so folks use other clients, perhaps Bigtop will address that. How about we rethink the user experience, not necessarily for the big screen - focus on Google services. We have fragmentation issues to work through.

Should we revisit the rules, now we aren't an upstart open source os? Not that we should stop anything we are doing right now, but over next two weeks take the time to step back and look at the overall situation. Nightmare scenario is we lose control of Android … can't take what we have here for granted.

Hiroshi: goal for last year was "win in tablets" and we made a ton of progress, but still more to do. Secondly, there's a bunch of new fronts we are about to open: watches, TV, laptops … is that too many this year? How do we prioritize, and sequence thing so we don't lose control. The world is a different place back in 2007, and now there are companies that want to take our ecosystem away.

Sundar makes the comparison of Chromium, where – like Android – you keep open source, but keep a competitive lead and users happy by executing super, super fast on our product.

Stepping back, we need a unified vision for how all these new computing efforts work together: phones, tablet, laptop, watch, glass.

EXHIBIT 2726

GOOG-PLAY-006356225

EXHIBIT 2726-001

Discussion around the ChromeOS plans. More laptops coming down end of the year, and we should stick to that plan but hold the line there. Perhaps we breathe here. Sundar has a top ten list of things to do urgently, and fixing the world of laptops didn't make that list. Fixing retail, fixing marketing were.

Good open question, what is our long term plan for hardware. I.e. what's our plan against Samsung. The are really big, like 20% of Korean GDP, 200B Cap … vertically integrated, conglomerate.

Makes the point that the problem we are well suited to resolve - how do the plethora of devices consumers use now and in the future interoperate - is not the same as a hardware strategy. Bottom line is a lot of decisions fall out of what our hardware plan looks like two years from now.

Hiroshi posits: What are the "Crown Jewels" we should be protecting? Suggests: The ability to present the best experience to users. And ability to update.

Discussion how successful the distribution is today. Sundar provides example of HTC One, and how hard it was to get to Google services on this device. They were there, but the UX was so difficult to get there. E.g. our apps are in stock at Walmart … but in the back room where useless to customer.

Sundar's List (written on board)
- Phones, Tablet - Win on usage of our core experience
- Great User Experience - UI, services, guidelines
- Control of Updates - Security
- 5 New Great Cloud Services
  o Now
  o Voice
  o Babel
  o Photos
  o Bigtop
  o Drive
- Third Party Developers
- Below the line, also things to think about …
  o Nexus brand, positioning
  o How we ship watch, wolfie

Discussion around theoretical working models with Samsung. We want to work together with them. Facebook is a threat in that it could provide a viable software alternative to Samsung. Thinking long term - e.g. many generation out hardware. Samsung and other partners don't want to push Nexus products .. we don't have global scale, or a long term roadmap. Perhaps we should work with them on products other then just Nexus branded - e.g. Galaxy line.

mhershenson proposes the idea of focusing on chip technology and standardized display size and help grow the full ecosystem of OEMs to compete.

EXHIBIT 2726-002

Note, Samsung is a big machine, not just in hardware but also in go to market strategy. They had massive spf for s4, and people on every corner pushing devices.

daveburke raises (mumbles, really) the point that we also have an issue where gingerbread was the last OS that really works on lower cost, 512MB phones. This is causing fragmentation and perhaps we should focus on that more.

Open questions about *why* we aren't winning in tablets; is it about our position as productivity vs entertainment device? Sundar makes the point that search is a good proxy for all kinds of usage, no matter what the device is used for so metric still indicates something critical;

If phones and tablets are focus, should we think about another 10" tablet?

Note: sundar and pgenannai will share slides of these metrics they have been looking at (discussed, but not presented at meeting).
Sundar raises the issue of current pricing proposal of Flo. Price is too low for anyone to make any money, so no one wants to sell. [lagerling will setup]

Follow on meetings Wed/Thu with Hiroshi etc. to continue this discussion.

On Mon, Apr 15, 2013 at 6:11 PM, Ryan PC Gibson <██████@google.com> wrote:
Let me know if you have additional agenda items for tomorrow's leadership meeting.

1.   Nexus update (devices and store)
2.   Platform / apps update
3.   Play update
4.   New Initiatives (e.g. Nova, Auto, Ads, Skyline)
5.   Partnerships
6.   Staffing, HR, New Hires

7.   Other? Rumors?

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** Ryan PC Gibson ** Android Program Management **

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EXHIBIT 2726-003

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EXHIBIT 2726-004